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FinancialPlanning

Wealthtech Weekly

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Reporter

When advisors look at a client's entire financial picture, it's hard to disentangle tax, estate and insurance planning from financial planning. In reality, everything affects everything else. So when FP Alpha announced its integration with eMoney, William Trout, of Datos Insights, saw it as a way to solve one of the fundamental challenges advisors face: translating comprehensive financial plans into actionable implementation.

Do you use either or both of these platforms? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

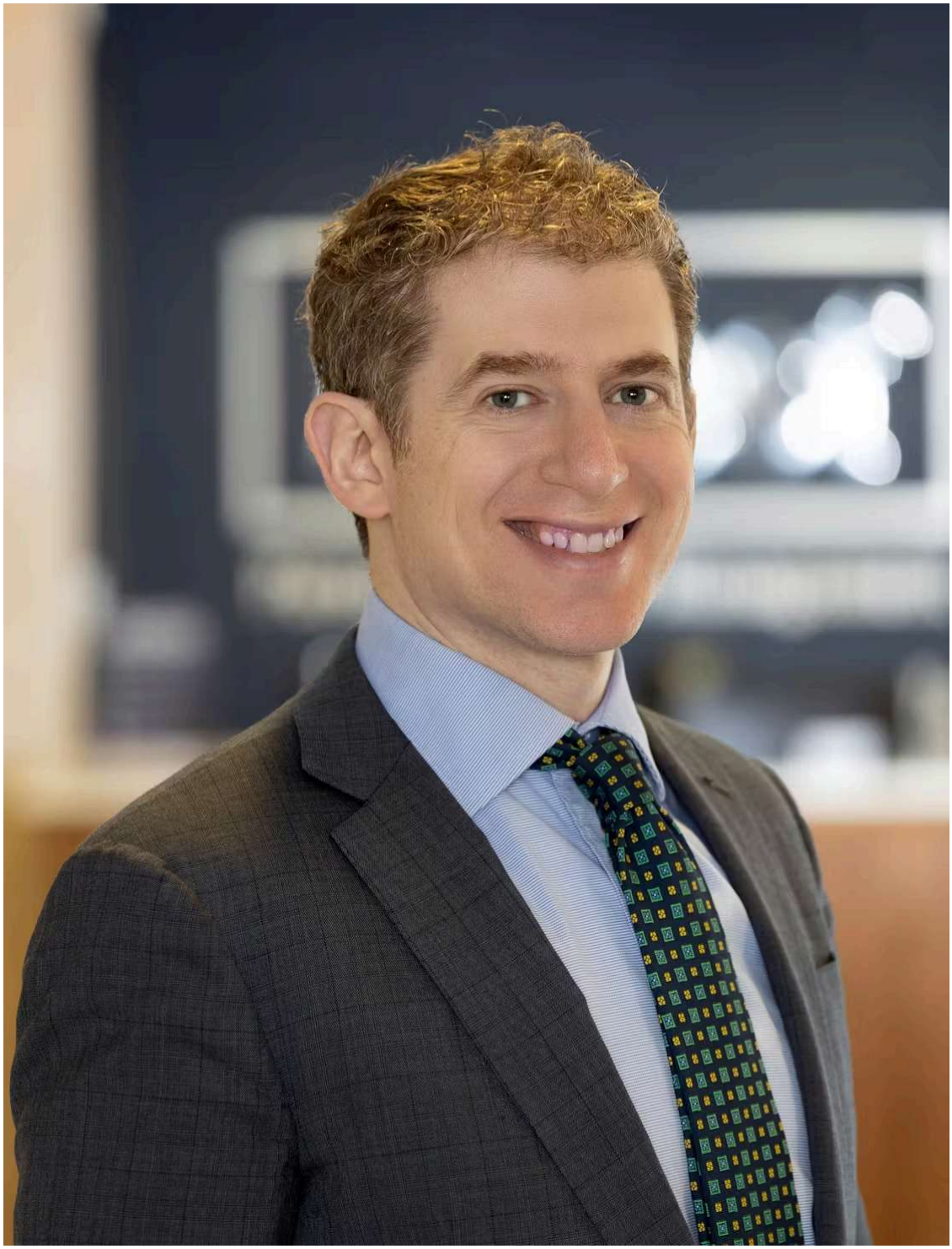
As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

FP Alpha unveils integration with eMoney



The integration eliminates the need for a third-party intermediary between the two platforms, allowing for a direct connection between financial planning and tax, estate and insurance data.

- **Should advisors let rare coins jingle in client portfolios?**
  Advisors and experts say finding the right rare currency to invest in can add diversification to a portfolio. But scams are rampant, so buyers should beware.

- **Advisors say this is their toughest challenge. Here's how they're solving it**
  One-third of financial advisors say balancing personalization with growth is the hardest trade-off for them to manage. Doing so successfully means making hard choices about what's most important for clients and the business.
- **Alarmingly few wealth firms have more than handshake succession deals**
  Less than a third of firms have a formal, documented plan in place, according to this month's Financial Advisor Confidence Outlook survey. Experts say this is a dangerous state of affairs.
- **Advisors steady clients as risk tolerance falls**
  Political instability and other pressures are feeding some clients' portfolio fears, advisors say in this month's Financial Advisor Confidence Outlook.

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